

Cliffs Notes™ from Marketing Partner Forum 2025



Presented by:
Megan Braverman
Berbay Marketing & PR

A marketing and PR agency specializing in working with professional service firms

THE CHANGE CONUNDRUM

AI

Reputation

Client Demands

Silos

Profitability

Business Development

Data

Competition

Generational Divides

Pricing

Retention

Technology

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State of the Legal Market



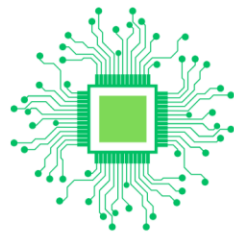
Key Challenges Facing the Legal Market



Federal Administration
Changes & Client Impact



DEI Upheaval

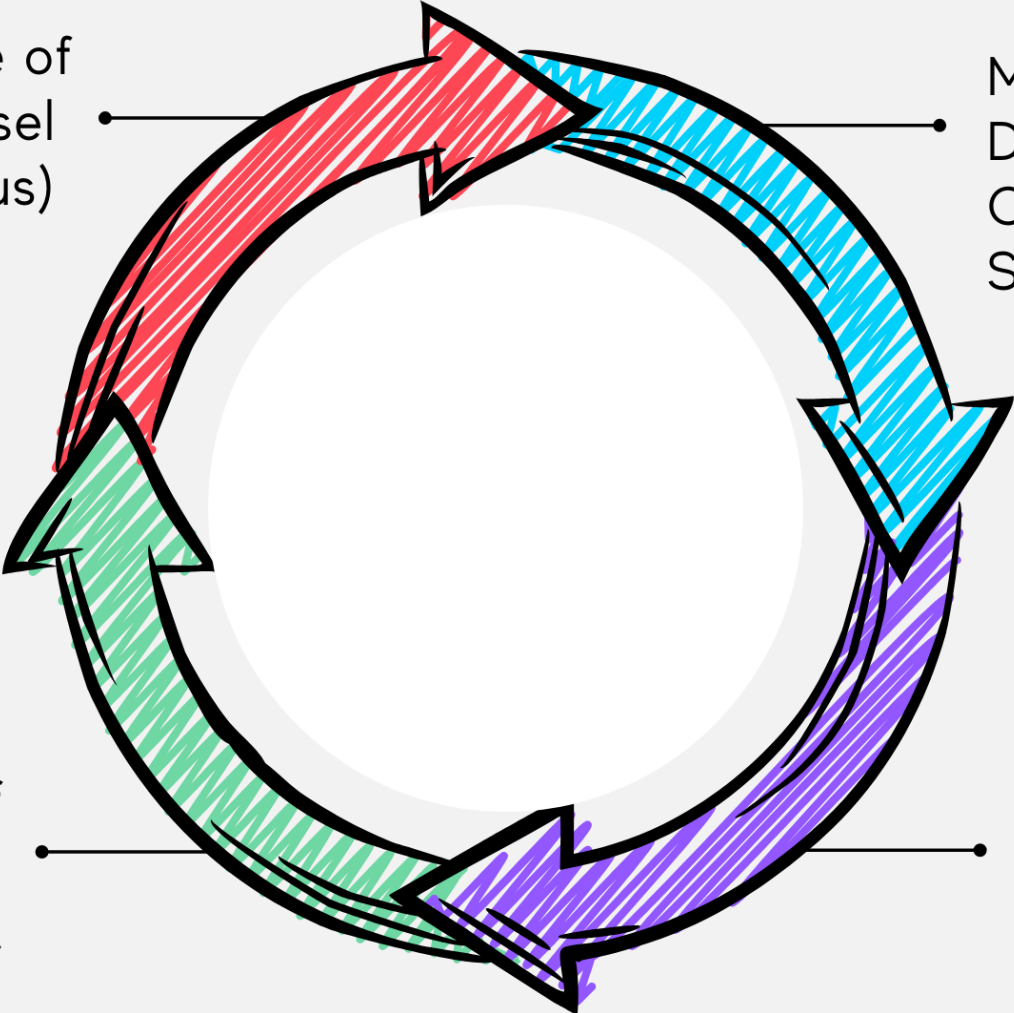


AI's Expanding Influence

Evolving Market Trends

Expanding Role of
General Counsel
(GC Plus)

Mobile
Demand &
Cost
Sensitivity



Challenge of
Technological
Debt

Shifting Law
Firm Business
Model

What GCs Want From Law Firms

“Make them forget you even have other clients.”



Deep Business Understanding



Feedback = Growth



Actionable, Not Just Legal



“Clear Is Kind”



Proactive, Not Reactive



Referrals Are Earned

Revisiting Referral Strategies

“If you don’t know where you are going, any road will get you there.”



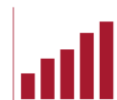
Industry Networks



High-Impact Events



Make Referrals Part of the Plan



Track



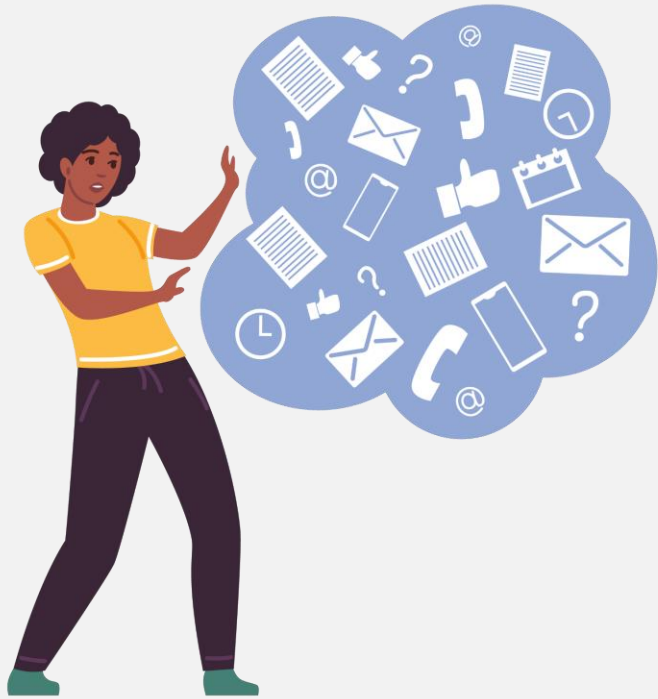
Train, Mentor & Incentivize

Data

Intent-Based
Marketing Tools

Effective Data
Management Strategies





The Rise of Intent-Based Marketing in Legal Practices

Challenges in Data
Management



Strategies for Effective Data Management

01

Conduct a
Comprehensive
Technology Audit

02

Implement Centralized
Data Visualization

03

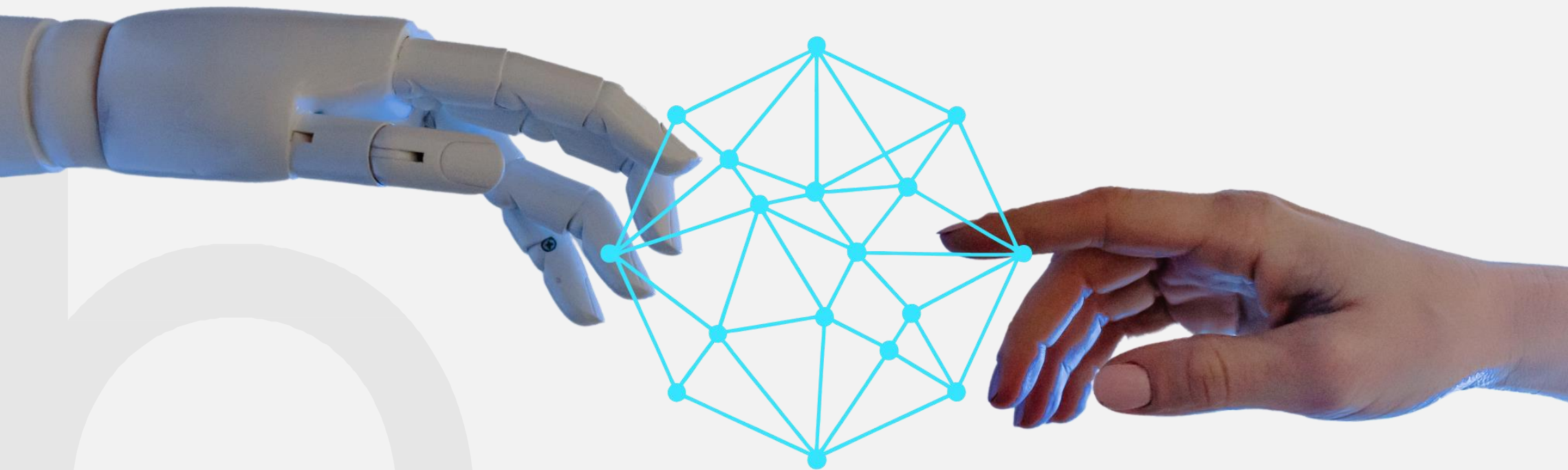
Establish a Data Integrity
Task Force

04

Promote a Culture of
Progress Over Perfection

05

Foster Technological
Proficiency Among
Attorneys

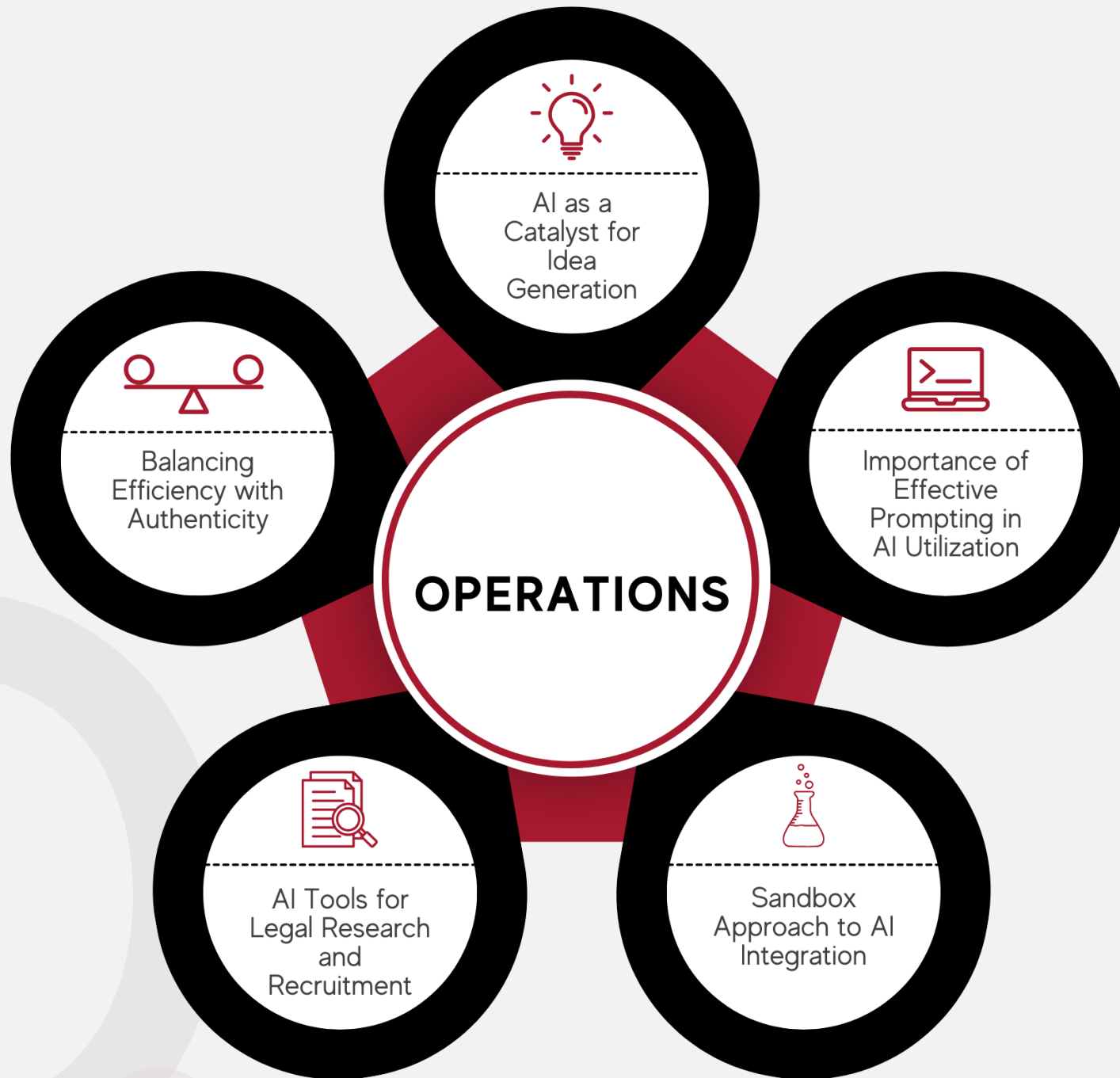




Power-User Examples



- Create a X-slide presentation on [topic] using the storytelling format. Suggest visuals and key points for maximum engagement.
- Here is a challenge: Generate 5 solutions from the perspective of 5 experts (lawyer, entrepreneur, CEO, CMO, engineer, etc.)
- Summarize the latest studies on [topic]. Provide key insights, actionable takeaways and a short list for further reading.
- Plan a 7-day content strategy for LinkedIn. Include post ideas, hooks and CTAs.
- I need help choosing between Option A and Option B. List the pros and cons of each and suggest which aligns with [goals/values].
- Map out 3 possible scenarios for [goal]. Include risks, opportunities and how to prepare for each one.
- I want to master [skill] in X months. Create a roadmap with daily tasks, milestone checks and resources to fast track my progress.



AI Tools to Optimize Firms

The logo for 'aiter' is written in a lowercase, sans-serif font. The letters 'ai' are in a vibrant blue, while 'ter' is in a lighter, lavender shade.

(social media ads / marketing strategy)

The logo for 'Crystal' features the word in a dark blue, bold, sans-serif font. To its right is a circular icon containing a stylized blue and white snowflake or crystal pattern.

(DISC / behavioral assessment)

The logo for 'ElevenLabs' consists of the word 'ElevenLabs' in a bold, black, sans-serif font.

(cloning voice)

The logo for 'invideo AI' includes a colorful icon of a stylized video camera or play button on the left, followed by the text 'invideo AI' in a bold, black, sans-serif font.

(creating videos)

The logo for 'logoai' features a colorful icon of a stylized person or figure on the left, followed by the text 'logoai' in a bold, black, sans-serif font.

(creating logos)

The logo for 'NotebookLM' shows a stylized icon of a notebook or document on the left, followed by the text 'NotebookLM' in a black, sans-serif font.

(creating podcasts)

The logo for 'PLAUD NOTE' features the word 'PLAUD' in a large, spaced-out, black, sans-serif font, with 'NOTE' in a smaller font to its right.

(recording)

The logo for 'SlidesAI' includes a blue icon of a speech bubble or document on the left, followed by the text 'SlidesAI' in a bold, black, sans-serif font.

(creating presentations)

The logo for 'Talonic' features a purple icon of a stylized network or brain on the left, followed by the text 'Talonic' in a bold, black, sans-serif font.

(spreadsheet analysis)

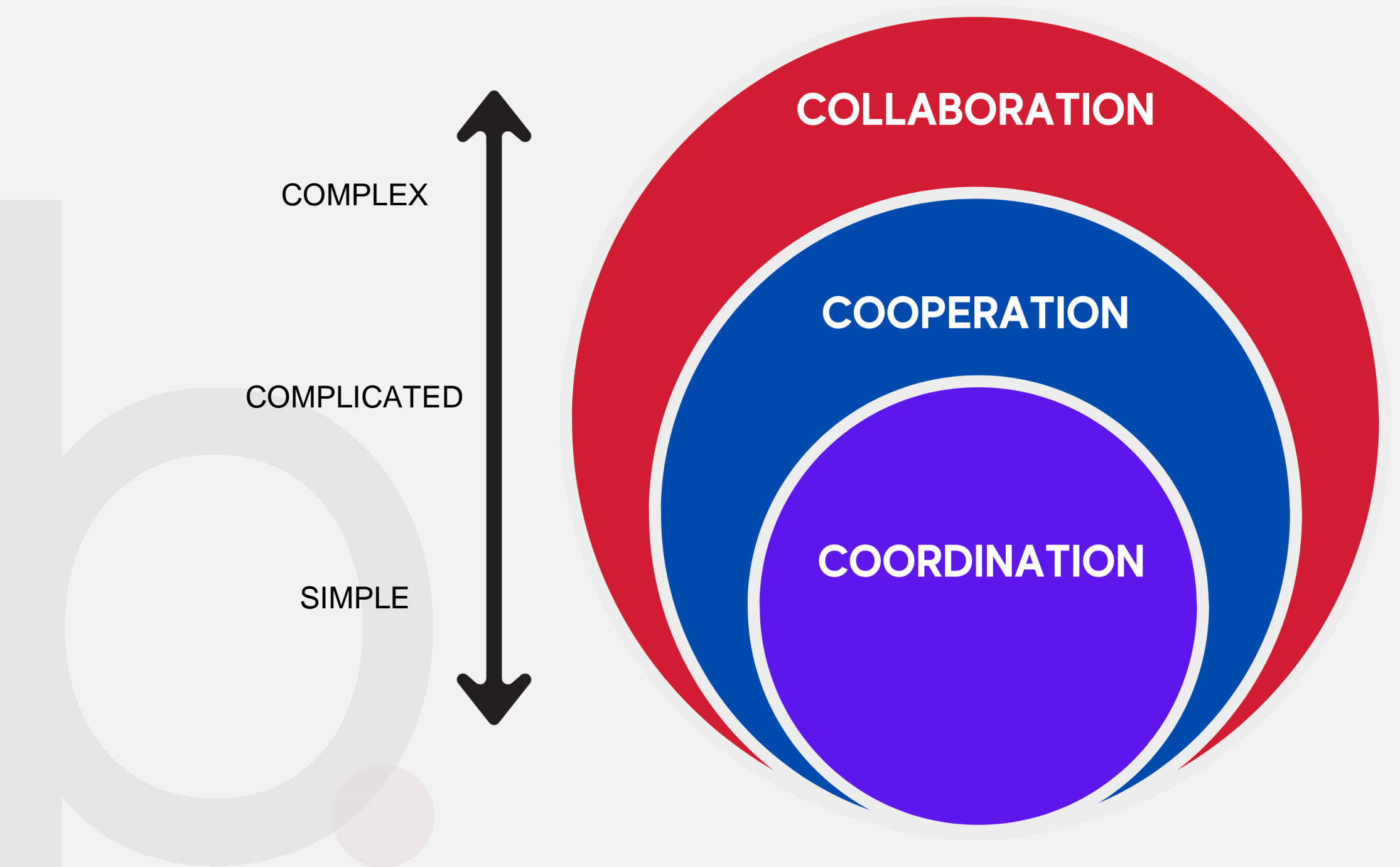
The logo for 'zinnia' is written in a lowercase, green, sans-serif font.

(sales workflow)

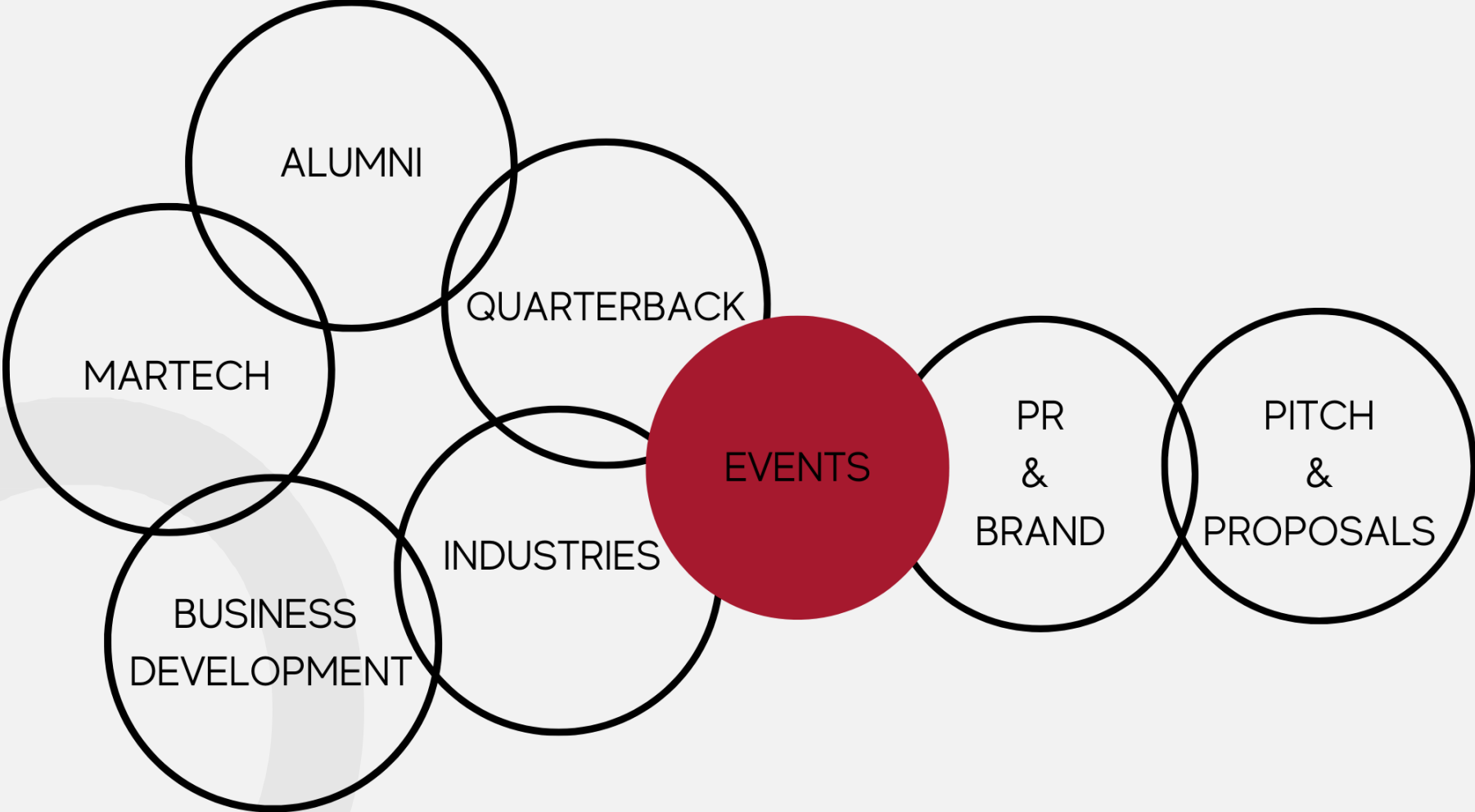
Advanced Organizational Techniques to Foster High-Performance Teams



The Triple C Approach



Ballard Spahr Example: An Integrated Team



Benefits of an Integrated Team



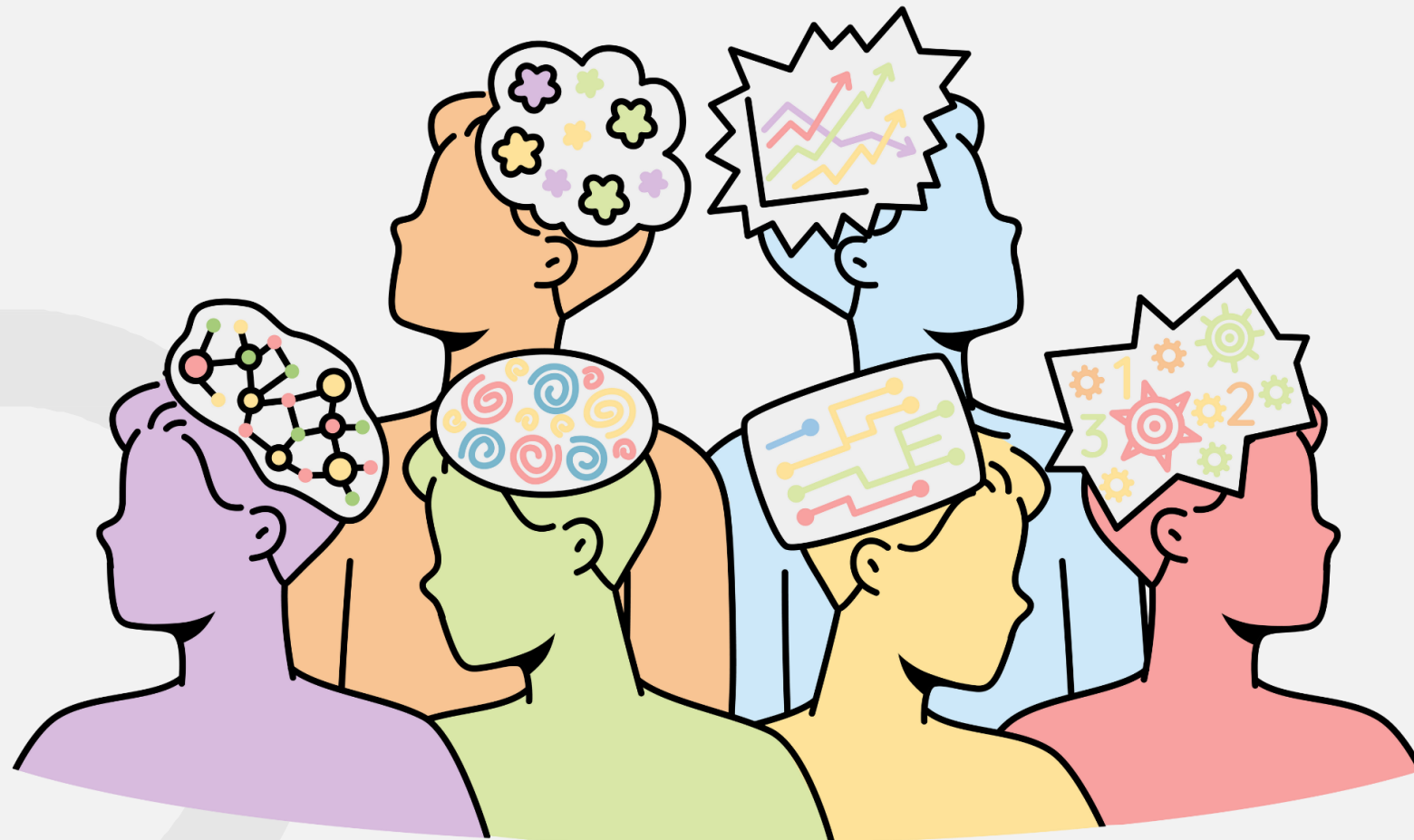
Example of an Integrated Team

CLIENT NAME	PRACTICE AREA					
	IP	Life Science	Litigation & Dispute Resolution	Private Equity	Real Estate	Technology
Finance Client 1	0.1K	0.8K	5.3K	3.5K	2.3K	52.3K
Real Estate Client 1	0.0K	0.4K	0.6K	2.7K	14.3K	44.5K
Tech Client 1	0.1K	0.8K	10.4K	10.0K	4.2K	109.3K
Tech Client 2	0.0K	0.4K	5.3K	6.5K	4.4K	68.4K
Tech Client 3	0.5K	0.3K	8.0K	10.4K	0.6K	47.7K
Tech Client 4	0.0K	0.5K	9.9K	3.7K	1.9K	40.7K


Identifying Growth Opportunities

- + Leverage data to spot expansion areas
- + Evaluate client growth potential
- + Focus on deepening 10 relationships versus 200
- + Client teams as a tool
- + Advance collaboration leads to stronger client retention
- + Invest in partner skill sets for client collaboration
- + Ask: Who are your most important clients, and what are you doing to protect them?
- + The role of the relationship partner
- + Don't forget to encourage knowledge sharing


Executive Talent & Multi-Generational Approach



Part 1: Executive Talent –Why Lawyers Move and How to Retain Them



THE DECLINE OF FIRM LOYALTY

- 
- + Why do they move?
 - + Partner recruiting & retention strategies

Part 2: Multi-Generational Workforce – Understanding and Engaging Different Generations

[VIDEO](#)

Dimension	Baby Boomers (1946-1964)	Gen X (1965-1980)	Millennials (1981-1996)	Gen Z (1997-2012)
% of Workforce	7%	33%	40%	20%
Work Ethic	Loyal, hardworking, value seniority	Independent, skeptical, results-driven	Collaborative, seek work-life balance	Entrepreneurial, value authenticity
Communication Style	Face to face, formal	Direct, prefer email	Digital-first, prefer messaging apps	Highly digital, prefer social media
Technology Use	Adopted later, prefer simple tools	Comfortable with tech	Tech-savvy, early adopters	Tech-native, highly reliant on devices
Career Goals	Stability, long tenure	Work-life balance, skill development	Purpose-driven, career mobility	Personal fulfillment, continuous learning
Learning Preference	Traditional, instructor led	Self-directed, e-learning	Interactive, collaborative learning	Microlearning, on-demand digital tools
Preferred Leadership	Hierarchical, authoritative	Democratic, adoptable	Mentorship-driven inspiring	Inclusive, supportive
Feedback Style	Infrequent, only when necessary	Regular but constructive	Immediate, continuous	Instantaneous, real-time feedback
Motivators	Recognition, financial rewards	Autonomy, skill-building	Personal growth, making a difference	Social impact, flexibility
Collaboration	Team-oriented, in-person	Independent yet collaborative	Highly collaborative, virtual teamwork	Socially networked, global mindset
Key Events & Milestones	Civil rights movement, Vietnam war, moon landing	Fall of the Berlin Wall, rise of personal computers, AIDS epidemic	9/11 attacks, Great Recession, Rise of social media	COVID pandemic, climate change awareness, digital revolution

Thomson Reuters Institute

Part 2: Multi-Generational Workforce – Understanding and Engaging Different Generations

- + People's experiences and stigmas are different; be mindful of this
- + Navigating workplace norms & biases
- + Two-way mentorship & communication
- + The return to office debate

Thank You



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